

# Slovak Republic

## Tourism in the economy and outlook for recovery

Tourism has been of growing importance to the Slovak Republic's economy. Following record numbers in 2019, international tourism receipts fell to EUR 1.1 billion in 2020, 62% lower than in 2019. This decline saw tourism's direct economic contribution fall to 1.2% of GDP (down from 2.8% in 2019), with tourism exports falling to 12.5% of services exports (down from 26.1%). The number of employees in accommodation and catering establishments was 92 600, representing 3.7% of the total workforce in 2020.

In 2020, the Slovak Republic recorded 3.2 million tourists in accommodation establishments, the lowest level in twenty years. The number of international tourists decreased by 65.5% to 854 000 tourists in 2020, before declining further to 576 000 tourists in 2021.

The sector has mainly been supported by domestic tourists, with accommodation providers registering 2.1 million domestic tourists in 2021, down from almost 2.4 million in 2020 and still 45% below pre-pandemic levels.

In total, tourists spent 9.8 million nights in all means of accommodation in 2020, representing a year-on-year decrease of 45%. This declined further in 2021 to 8.2 million nights, 53.9% below 2019 levels.

## Tourism governance and funding

The Ministry of Transport and Construction has responsibility for tourism in the Slovak Republic. The Tourism Section of the Ministry is divided into departments covering national tourism policy, regional and international co-operation and tourism state aid.

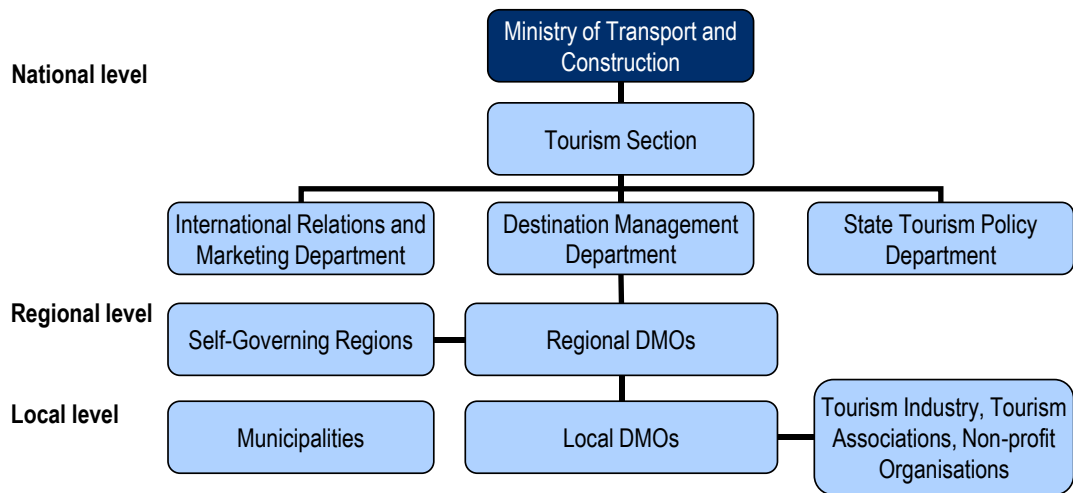
The Ministry co-operates with other ministries through participation in various committees dealing with issues affecting tourism, including the Working Group to Co-ordinate the Presentation of Slovakia Abroad, the Interdepartmental Commission of the Geo-parks Network, the Impact and Adaptation Steering group, and the Working Group of the Government Council for Vocational Education and Training.

At the regional level, the Slovak Republic delegates tourism responsibilities to self-governing bodies in eight regions and municipalities. Local and regional destination management organisations (DMOs) are responsible for developing tourism products and promotion. Local DMOs are formed by municipalities, tourism business entities, non-profit organisations, foundations and associations. Regional DMOs are formed by the regional self-governing authorities and at least one local DMO. There are 49 local and eight regional DMOs in the Slovak Republic, funded by subsidies provided by the Ministry, membership fees and other sources.

The Ministry established Slovakia Travel in 2021 as the national tourism organisation responsible for tourism marketing and promotion. It also serves as a tourism data centre. The Slovak Tourism Association, made up of representatives of the main tourism organisations, promotes co-operation in the sector and advises on legislative changes. At local and regional levels, tourism associations contribute to quality improvement, professional training and the sharing of best practices.

The ministerial budget for tourism was EUR 9.8 million in 2021, down from EUR 12 million in 2018. Of the 2021 budget, EUR 1.2 million was dedicated to marketing and promotional activities, and EUR 8.1 million was for subsidies to local and regional DMOs, mainly for marketing, product development and tourist infrastructure. There was an additional EUR 257.5 million for state aid in tourism.

### Slovak Republic: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Transport and Construction, 2022.

### Tourism policies and programmes

To tackle the COVID-19 and geopolitical crises, the National Council of the Slovak Republic approved the Tourism Support Act, which established a framework for the creation of state aid schemes (see box below).

In response to the humanitarian crisis from Russia's war in Ukraine, Slovakia launched the Help for Ukraine website run by the Ministry of Transport and Construction to provide more information on the available accommodation for Ukrainian refugees in state and private facilities. The website includes a reservation system to bring together these public facilities and hotel accommodation capacities. Moreover, the country approved a law called the Lex Ukraine, which will make it easier for refugees to stay in the Slovak Republic.

In 2022, the Slovak Republic worked on redesigning the National Sustainable Tourism Strategy and action plans for 2030. Due to the pandemic, the war in Ukraine and a newly set up national tourism board, a redesign of the existing strategy was needed. A revised Strategy of Sustainable Tourism Development 2030 will aim to increase the competitiveness of tourism, better use its potential, balance regional disparities and create new jobs.

Redesign and state support for employment strategies in hospitality and food services is a key priority in the Slovak Republic as the country is facing a tourism employment crisis. Some workers have refused to return to tourism due to uncertainty and instability and instead stay in the automotive or other sectors.

Further, the sustainability of tourism is a priority. The strategy should set priorities and goals for the intensive and sustainable use of the potential of the tourism sector in the Slovak Republic. The Strategy will reflect the results of a co-creation process of the European Commission's Transition Pathway for Tourism.

In addition, unifying all stakeholders that participate in tourism is a priority. The Slovak Republic is to set new information channels on a national level through regional tourism offices, the national tourism board,

municipalities and private entities. In the 2030 strategy, the Slovak Republic will also set new communication channels between national and overseas stakeholders, especially in EU countries.

### Tourism Support Act in the Slovak Republic

In an effort to mitigate the consequences of COVID-19 on the tourism sector in the Slovak Republic, the National Council approved an amendment to the Tourism Support Act in November 2020, which established a framework for the creation of state aid schemes and minimum aid for the tourism sector totalling EUR 100 million. The aim was to maintain employment and ensure the competitiveness of tourism businesses through the compensation of fixed costs.

All domestic tourism entities whose sales fell by more than 40% in 2020 compared to the same period in the previous year were able to apply for this aid. This financial support was available for up to 10% of 2019 revenues, depending on the decrease in revenues suffered. In April 2021, the Slovak Republic released an additional EUR 120 million to help the gastronomy and tourism sectors, with a limit of EUR 200 000 per applicant.

The European Commission approved the state aid scheme under the Temporary Framework, allowing for aid of up to EUR 1 million per undertaking. Its purpose was to support enterprises in the tourism sector, providing a financial contribution to cover an element of fixed costs. The total budget for this state aid scheme was EUR 37 million.

It is important to support it within the framework of a common European co-ordination. Accelerating the green and digital transition and improving the resilience of the tourism ecosystem are priorities in today's work. In addition, entrepreneurs in tourism were able to apply for general support for employment provided by the Ministry of Labour, Social Affairs and Family, and support for rent provided by the Ministry of Economy.

## Statistical Profile

### Slovak Republic: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	3 213	3 340	3 958	2 356	2 149
Overnight visitors (tourists)	3 213	3 340	3 958	2 356	2 149
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	9 507	9 819	11 453	7 443	6 704
Hotels and similar establishments	9 233	9 501	11 047	7 054	6 340
Other collective establishments	118	128	131	140	151
Private accommodation	156	189	275	249	213
<b>Inbound tourism</b>					
Total international arrivals	2 162	2 256	2 475	854	576
Overnight visitors (tourists)	2 162	2 256	2 475	854	576
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Czech Republic	645	702	777	378	230
Poland	210	226	240	116	59
Germany	192	178	182	63	53
Hungary	101	112	124	43	28
Austria	97	100	97	31	26
Nights in all types of accommodation	5 429	5 696	6 251	2 348	1 465
Hotels and similar establishments	5 124	5 345	5 855	2 121	1 358
Other collective establishments	193	214	193	123	67
Private accommodation	112	138	203	104	41
<b>Outbound tourism</b>					
Total international departures	6 649	8 321	9 669	..	..
Overnight visitors (tourists)	4 244	5 313	5 971	..	..
Same-day visitors (excursionists)	2 405	3 008	3 699	..	..
Top destinations					
Czech Republic	..	1 060	1 281	323	384
Croatia	..	440	423	122	309
Hungary	..	308	240	52	101
Austria	..	309	351	82	99
Italy	..	257	295	.. c	46
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	2 665	2 817	2 996	1 162	1 001
International travel receipts	2 588	2 710	2 861	1 132	941
International passenger transport receipts	77	107	134	31	59
<b>Outbound tourism</b>					
Total international expenditure	2 296	2 403	2 501	1 171	1 313
International travel expenditure	2 125	2 225	2 313	1 111	1 257
International passenger transport expenditure	171	178	188	61	56

.. Not available; c Confidential data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/w9xhgc>

## Slovak Republic: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed				
		2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>44 477</b>	<b>174 505</b>	<b>177 638</b>	<b>184 891</b>	..	..
Accommodation services for visitors	3 393	17 819	17 998	18 384	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	14 482	68 653	70 032	74 540	..	..
Passenger transport	3 454	26 335	26 476	26 635	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	522	1 187	1 402	1 501	..	..
Travel agencies and other reservation services industry	1 333	3 066	3 327	3 386	..	..
Cultural industry	2 064	9 871	10 152	10 475	..	..
Sports and recreation industry	4 508	18 762	18 932	19 844	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	14 721	28 812	29 319	30 126	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/3fz2r4>


## Slovak Republic: Internal tourism consumption

Million EUR

	2019		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>3 049</b>	<b>1 645</b>	<b>5 875</b>
Tourism characteristic products	2 290	1 083	4 554
Accommodation services for visitors	515	392	1 020
Food and beverage serving services	582	366	952
Passenger transport services	600	61	1 266
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	42	43	85
Travel agencies and other reservation services industry	208	10	219
Cultural services	72	20	331
Sports and recreation services	148	79	307
Country-specific tourism characteristic goods	40	53	94
Country-specific tourism characteristic services	82	60	280
Other consumption products	759	562	1 321
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/xtdyo5>



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